

SS-PAPT-3-10003

70 -- Practitioner and Examiner Recertification Exam Software

Sources Sought and Pre-Solicitation Synopsis Notice to provide COTS software for Recertification of Patent Practitioners and Examiners.

USPTO is issuing a Sources Sought/Pre-Solicitation Synopsis to seek qualified sources capable of supplying commercial-off-the-shelf (COTS) software. This procurement will utilize the newly issued Patent and Trademark Acquisition Guidelines (PTAG). Under PTAG, the USPTO is authorized to limit the number of offerors to achieve maximum reasonable competition. Upon review of the responses to this Sources Sought/Synopsis, an RFP will be issued only to those offerors who are most qualified to fulfill the requirements, based upon technical product capability proposals submitted in response to this synopsis. Vendors should identify with their submissions similar implementation to the USPTO requirements of their product. Those vendors who are determined not to be the most qualified will be advised. USPTO may elect to request product demonstrations as part of the follow-on technical evaluation. USPTO may also elect, in accordance with the PTAG, to negotiate only with the most highly rated vendor. The PTAG was published in the 2003 Federal Register (<http://www.gpoaccess.gov/fr/index.html>, search on "PTAG")

USPTO has a requirement for COTS software to automate the assessment of approximately 28,000 Patent Practitioners and 4000 Patent Examiners. The software will be used to implement the following initiatives of the USPTO 21st Century Strategic Plan:

- Monitor Practitioner Adherence to Rules of Practice: Periodic Recertification for Registered Practitioners
<http://www.uspto.gov/web/offices/com/strat21/action/lr1cp51.htm>
- Certification of Knowledge, Skills, and Abilities of Examiners Before Promotion to GS-13
<http://www.uspto.gov/web/offices/com/strat21/action/t10p21.htm>
- Re-certification of Knowledge, Skills, and Ability of Primary Examiners, including Legal and Automation Training of Primary Examiners
http://www.uspto.gov/web/offices/com/strat21/action/t9p20_22.htm

The software shall enable a Web-based delivery of the assessment to Practitioners on the Internet and Examiners on the USPTO Intranet. The software shall support the concurrent delivery of multiple types of tests. The software shall be able to archive previously delivered tests and activate them for redelivery. The software shall meet Section 508 compliancy requirements. The software shall run on UNIX, Linux, or AIX and use an Oracle database to store data. The software shall provide an easy to use interface for question and test creation, including the option to import test questions from a text file. The software shall allow creation of multiple-choice questions with the option to randomize the ordering of questions and answer choices. The software shall allow the creation of tests having long narratives with embedded questions, as well as the option to include hypertext links to reference material. The software shall provide the capability to customize the look and feel of a test. (For example, the font type and size should be customizable.) The software shall provide the option to display detailed feedback either after each question is answered or at the end of the test. The software shall provide a way to group

questions into categories. In a test consisting of questions from multiple categories, the subtotals from each category shall be provided to the test-taker in the test results to show areas that need improvement. The software shall provide the option to set a time limit for the overall test. The software shall provide the option to set the passing score for a test. The software shall allow test-takers to self-register. The software shall require test-takers to log in with a user name and password to take a test. The software shall allow test-takers to resume testing at the place that they left off after a break or unexpected interruption. The software shall have the option of automatically generating emails to test-takers. The software shall allow for conditional branching within a test. (For example, test-takers cannot proceed to the next question until the current question is answered correctly.)

The software shall provide the option to set multiple levels of access privileges for administrator accounts. The software shall provide the administrator the ability to restrict access of certain users to particular tests. The software shall provide pre-built reports or offer a tool to create reports summarizing test results, outcome correlation, and other pertinent information.

In determining technical capability USPTO may test and technically evaluate the proposed systems based on the following factors: security (data encryption and integrity), proven implementation, ease of maintenance, scalability, performance, high availability, component reusability, and compatibility with USPTO architecture. Specify if software can integrate with IBM WebSphere. Include benchmarks for each platform supported, including concurrent user statistics, if available. Multiple approaches are welcomed. The technical capability submissions, other than product literature shall not exceed 10 pages. Ultimate vendor selection will be based upon Best Value as follows: technical and past performance, when combined, are more important than price. POCs: Janet Carlson, 703-305-8219 (Janet.Carlson@uspto.gov); Hope Smith 703-305-8017 (Hope.Smith@uspto.gov)